

ISSN-2012-0664



Republic of the Philippines
Department of Agriculture
BUREAU OF AGRICULTURAL STATISTICS
Quezon City

DAIRY INDUSTRY PERFORMANCE REPORT

January - December 2011



June 2012





EXPLANATORY NOTES

The Dairy Industry Performance Report presents the industry situation in terms of total inventory of dairy animals by classification; milk production by animal type and by source; disposition of milk production, total supply and utilization of dairy products; and volume and value of dairy imports and exports.

The various dairy statistics used in this report are products of collaborative efforts of the Bureau of Agricultural Statistics (BAS), the National Dairy Authority (NDA) and the Philippine Carabao Center (PCC). BAS conducts the Semi-annual Survey of Dairy Enterprises in selected provinces where dairying exists. The survey is intended to generate data on inventory of dairy animals by type and breed, milk production of dairy animals by type and disposition. Systematic sampling is utilized in drawing samples for individual and backyard carabao dairy farms. Complete enumeration is applied on top producing dairy cooperatives, commercial farms, government-owned and private institutions, for all types of animals, i.e. cattle, carabao and goat.

The National Dairy Authority (NDA) provides BAS with data on inventory of dairy cattle and milk production generated from the monitoring records of their assisted dairy cooperatives. The Philippine Carabao Center (PCC) provides BAS with dairy data generated from the monitoring records of their assisted carabao dairy cooperatives and federations as well as from the institutional dairying activities of PCC Centers in selected regions and university campuses in the country, e.g., UP at Los Baños.

**TABLE OF CONTENTS**

Explanatory Notes	i
Table of Contents	ii
Highlights	iii
Inventory	1
Milk Production	2
Supply Utilization of Milk	3
Imports	
Volume and Value of Imports	3
Volume of Imports by Country of Origin	4
Exports	
Volume and Value of Exports	4
By Country of Destination	5
Prices	5

Figures

1. Total Inventory of Dairy Animals by Type, Philippines, as of January 1, 2011-2012	iii
2. Milk Production by Animal Type, Philippines, 2010-2011	iii
3. Volume (in '000 m.t.) and Value(in CIF MUS\$) of Dairy Imports, Philippines, 2010-2011	iii
4. Distribution of Dairy Inventory by Animal Type, Philippines, as of January 1, 2012	1
5. Distribution of Milk Production by Animal Type, Philippines, 2011	2
6. Volume of Exports by Country of Destination, Philippines, 2009-2011	5

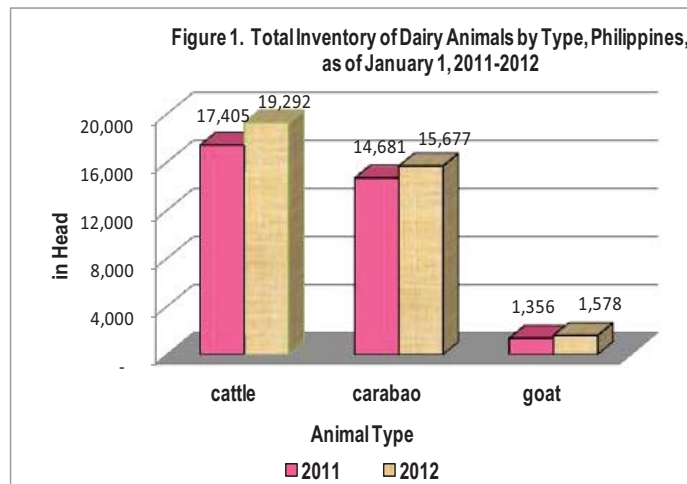
Statistical Tables

1. Total Inventory of Animals vis-à-vis Dairy Animals by Type, Philippines as of January 1, 2010-2012	1
2. Inventory of Dairy Animals by Animal Type and by Age Classification, Philippines, as of January 1, 2010-2012	1
3. Animals on the Milkline and Milk Production by Animal Type and Source, Philippines, 2010-2011	2
4. Supply Utilization of Milk, Philippines, 2009-2011	3
5. Volume and Value of Imports by Type of Dairy Products, Philippines, 2009-2011	3
6. Volume of Imports by Country of Origin, Philippines, 2009-2011	4
7. Volume and Value of Exports by Type of Dairy Products, Philippines, 2009-2011	4
8. Volume of Exports by Country of Destination, Philippines, 2009 – 2011	5
9. Average Price of Milk by Animal Type, Philippines, 2009– 2011	5

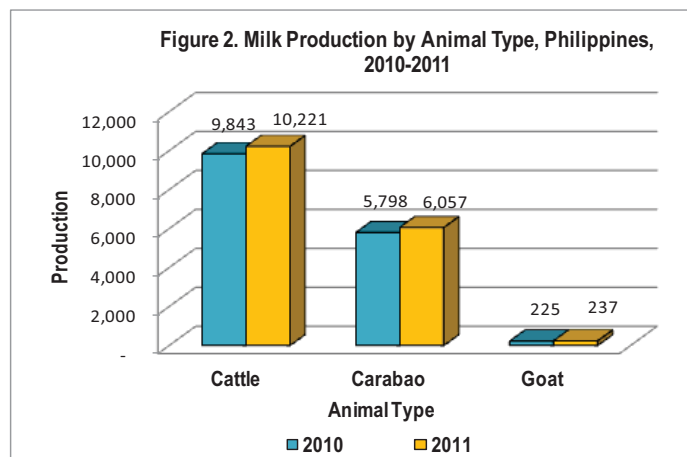


HIGHLIGHTS

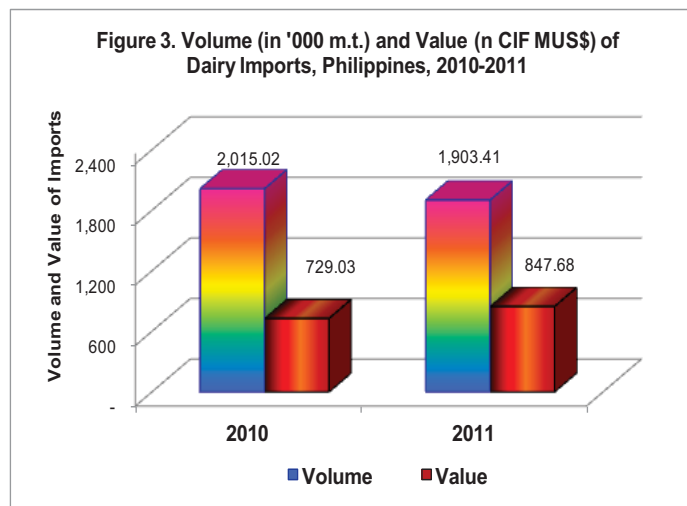
❖ As of January 1, 2012, the total dairy animal population was 36,547 head. This was 9.28 percent higher than last year's headcount. Dairy cattle stocks rose to 10.84 percent. Those of dairy carabao and dairy goat went up by 6.78 percent and 16.37 percent respectively.



❖ In 2011, fresh milk production in the country was 16.5 million liters, 3.72 percent higher than last year's level of 15.9 million liters. Of this total, 10.2 million liters or 61.9 percent were cow's milk; 6.0 million liters or 36.4 percent were carabao's milk and 0.24 million liters or 1.4 percent were goat's milk.



❖ The volume of dairy imports in 2011 was 1,903.41 thousand metric tons or 5.54 percent lower than the 2010 level of 2,015.02 thousand metric tons. There was an increase of 16.28 percent in the value of dairy imports, from the 2010 level of US\$ 729.03 million to US\$ 847.68 million in 2011.





INVENTORY

Table 1. Total Inventory of Animals vis-à-vis Inventory of Dairy Animals by Type, Philippines, as of January 1, 2009-2011
(Number of Head)

Animal Type	2010	2011	2012*	Percent Change
Total Cattle	2,570,879	2,518,407	2,493,803	(0.98)
Dairy Cattle	16,949	17,405	19,292	10.84
Total Carabao	3,270,406	3,075,259	2,963,980	(3.62)
Dairy Carabao	13,857	14,681	15,677	6.78
Total Goat	4,177,721	3,881,503	3,708,758	(4.45)
Dairy Goat	1,201	1,356	1,578	16.37

*- Preliminary

Table 2. Inventory of Dairy Animals by Animal Type by Age Classification, Philippines, as of January 1, 2010-2012
(Number of Head)

Animal Type/Age	2010	2011	2012*	Percent Change
TOTAL DAIRY	32,007	33,442	36,547	9.28
CATTLE	16,949	17,405	19,292	10.84
Bull	615	643	722	12.29
Dam	7,583	7,951	8,563	7.70
Heifer	2,231	2,134	2,404	12.65
Yearling	3,041	3,104	3,575	15.17
Calf	3,478	3,573	4,028	12.73
CARABAO	13,857	14,681	15,677	6.78
Bull	971	998	1,032	3.41
Dam	7,033	7,421	7,863	5.96
Heifer	912	978	1,057	8.08
Yearling	1,874	1,973	2,102	6.54
Calf	3,067	3,311	3,623	9.42
GOAT	1,201	1,356	1,578	16.37
Buck	91	103	121	17.48
Doe	636	709	813	14.67
Kid	369	425	508	19.53
Others	105	119	136	14.29

*- Preliminary

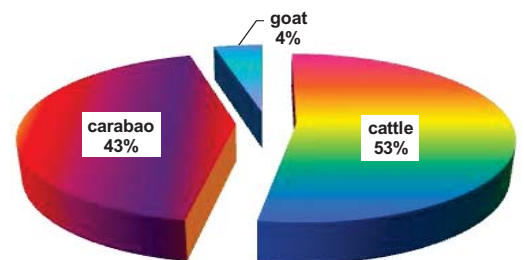
❖ In 2012, dairy cattle population was 0.77 percent of the total cattle population. Dairy carabao population was 0.53 percent of the total carabao population and dairy goat was less than 0.5 percent of the total goat population.

❖ As of January 1, 2012, the inventory of dairy animals stood at 36,547 head. This was 9.28 percent higher than the previous year's level of 34,422.

❖ There was 10.84 percent increase in dairy cattle population this year. Female breeders or dams accounted for 44 percent of the total dairy cattle which grew by 7.70 percent.

❖ In 2012, dairy carabao and dairy goat population grew by 6.78 percent and 16.37 percent, respectively.

Figure 4. Distribution of Dairy Inventory by Animal Type, Philippines, as of January 1, 2012





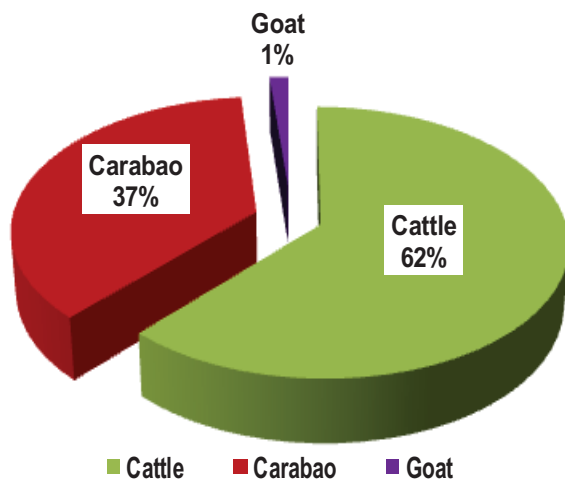
MILK PRODUCTION

Table 3. Animals on the Milklime and Milk Production by Animal Type and Source Philippines, 2010-2011

Animal Type/Source	2010		2011		Percent Change	
	Animals on the Milklime	Production (LME* in '000 Liters)	Animals on the Milklime	Production (LME* in '000 Liters)	Animals on the Milklime	Production (LME* in '000 Liters)
TOTAL	9,257	15,865.82	9,807	16,455.95	5.94	3.72
CATTLE	4,425	9,842.64	4,650	10,220.71	5.08	3.84
Individual	1,343	2,292.85	1,329	2,671.15	(1.04)	16.50
Cooperatives	2,394	5,919.45	2,516	5,606.67	5.10	(5.28)
Commercial	362	1,080.24	393	1,134.47	8.56	5.02
Institutional	326	550.10	412	808.42	26.38	46.96
CARABAO	4,435	5,798.21	4,694	5,997.82	5.84	3.44
Individual	2,901	2,555.44	3,088	2,620.08	6.44	2.53
Cooperatives	813	1,507.53	847	1,554.93	4.21	3.14
Commercial	142	363.10	152	392.33	7.12	8.05
Institutional	579	1,372.14	607	1,430.48	4.80	4.25
GOAT	397	224.97	463	237.42	16.69	5.54

Note: LME* - Liquid Milk Equivalent

Figure 5. Distribution of Milk Production by Animal Type, Philippines, 2011



- ❖ In 2011, total milk production in the country was 16,456 thousand liters. It grew by 3.72 percent against last year's level of 15,866 thousand liters.
- ❖ Milk production of dairy cattle increased by 3.84 percent from 9,843 thousand liters in 2010 to 10,221 thousand liters in 2011. Dairy carabao milk production went up by 3.44 percent and dairy goat milk production grew by 5.54 percent.
- ❖ The total number of dairy animals on the milklime increased by 5.94 percent. Dairy cattle count increased by 5.08. Dairy carabao and dairy goat on the milklime, likewise increased by 5.84 percent and 16.69 percent, respectively.



SUPPLY UTILIZATION

Table 4. Supply Utilization of Milk, Philippines, 2009-2011
(^{'000} m.t. - LME)

Particulars	2009	2010	2011	% Change	
				10/09	11/10
Local Production ^{1/}	14.41	15.86	16.45	10.06	3.72
Imports ^{2/}	1,789.65	2,015.02	1,903.41	12.59	(5.54)
Total supply	1,804.06	2,030.88	1,919.86	12.57	(5.47)
Exports ^{2/}	199.79	254.98	295.81	27.62	16.01
Net Domestic Supply	1,604.27	1,775.90	1,624.05	10.70	(8.55)
Human Population	92.23	94.01	95.81	1.93	1.91
Per Capita Supply (liters/year) ^{3/}	17.39	18.89	16.95	8.60	(10.27)

Source: National Dairy Authority (NDA)

^{1/} NDA assisted-projects and others

^{2/} NDA based on NSO data converted to LME

^{3/} Derived using Net Domestic supply/Human Population

* 1 liter of milk is approximately 1 kg of milk

LME- Liquid Milk Equivalent

❖ The total supply of milk in 2011 was 1,919.86 thousand metric tons. More than 99 percent of the total milk supply were imported.

❖ The total dairy imports in 2011 declined by 5.54 percent. This consequently, decreased the total supply of milk by 5.47 percent.

❖ In 2011, the net domestic supply of milk was 1,624.05 thousand metric tons. This was 8.55 percent lower than last year's supply. The derived per capita consumption of milk was 16.95 kilograms per year, or 10.27 percent lower than last year's per capita consumption.

IMPORTS

Table 5. Volume and Value of Imports by Type of Dairy Products
Philippines, 2009-2011
(^{'000} MT - In Liquid Milk Equivalent)

Particulars	2009		2010		2011		% Change	
	Volume (^{'000} mt)	Value (MUS\$-CIF)	Volume (^{'000} mt)	Value (MUS\$-CIF)	Volume (^{'000} mt)	Value (MUS\$-CIF)	Volume 10/09	Value 11/10
Total Import	1,789.65	466.72	2,015.02	729.03	1,903.41	847.68	(5.54)	16.28
1. Milk and Cream	1,577.28	382.02	1,780.94	585.83	1,665.21	672.78	(6.50)	14.84
Skim Milk Powder	697.64	185.17	867.42	317.05	877.63	383.15	1.18	20.85
Wholemilk Powder	262.72	76.00	253.74	103.49	223.14	105.50	(12.06)	1.94
Buttermilk	169.13	34.85	153.63	49.09	159.92	66.76	4.09	36.00
Whey Powder	304.31	34.34	320.91	50.11	302.73	53.26	(5.67)	6.29
Liquid (RTD) Milk	39.00	30.04	48.48	45.31	45.80	47.35	(5.53)	4.50
Evaporated	1.03	0.38	1.04	0.38	0.66	0.48	(36.54)	26.32
Others*	103.45	21.24	135.72	20.40	55.33	16.28	(59.23)	(20.20)
2. Butter	145.88	43.45	169.31	93.75	162.51	106.54	(4.02)	13.64
3. Cheese	59.81	37.53	52.60	39.23	70.47	63.54	33.97	61.97
4. Curd	6.68	3.72	12.17	10.22	5.22	4.82	(57.11)	(52.84)

Source: National Dairy Authority (NDA) and National Statistics Office (NSO)

* - includes Cream and Condensed Milk

- ❖ The total value of dairy imports in 2011 was USD 847.68 million. This was 16.28 percent higher than last year's import value of USD 729.03 million.
- ❖ Of the total milk imports, around 88 percent were classified under milk and cream and the rest were butter, cheese and curd.



**Table 6. Volume of Imports by Country of Origin
Philippines, 2009-2011
(In Liquid Milk Equivalent)**

Country Source	2009		2010		2011	
	Volume ('000 mt)	Percent Share	Volume ('000 mt)	Percent Share	Volume ('000 mt)	Percent Share
TOTAL	1,789.65	100.00	2,015.02	100.00	1,903.41	100.00
1. New Zealand	729.72	40.77	725.55	36.01	699.44	36.75
2. USA	319.29	17.84	502.81	24.95	513.45	26.98
3. Australia	340.81	19.04	225.27	11.18	179.86	9.45
4. Others	399.83	22.34	561.39	27.86	510.66	26.83

Source: National Dairy Authority (NDA)
National Statistics Office (NSO)

- ❖ This year, New Zealand and USA were the leading sources of imported dairy products. They supplied a total of 1,212.89 thousand metric tons or 63.70 percent of the total dairy imports of the Philippines.

EXPORTS

**Table 7. Volume and Value of Exports by Type of Dairy Products
Philippines, 2009-2011
(In Liquid Milk Equivalent)**

Particulars	2009		2010		2011		% Change	
	Volume ('000 M.T.)	Value ('000 US\$)	Volume ('000 M.T.)	Value ('000 US\$)	Volume ('000 M.T.)	Value ('000 US\$)	Volume 11/10	Value 11/10
Total Exports	199.79	99.41	254.98	142.12	295.81	176.69	16.01	24.32
Milk and Cream	194.01	95.62	249.95	138.14	291.01	173.44	16.43	25.55
Butter	0.14	0.06	0.11	0.04	0.25	0.10	127.27	150.00
Cheese	5.64	3.73	4.92	3.94	4.55	3.15	(7.52)	(20.05)

Source: National Dairy Authority (NDA)
National Statistics Office (NSO)

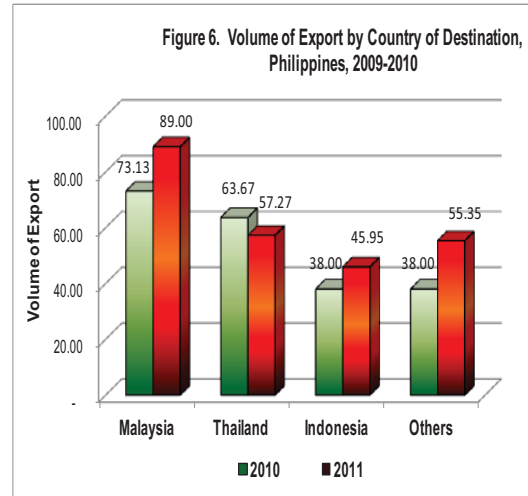
- ❖ The total volume of dairy products exported by the Philippines in 2011 was 295.81 thousand metric tons, higher by 16.01 percent against last year's record of 254.98 thousand metric tons.
- ❖ This year, milk and cream comprised 98 percent of the total dairy exports. The rest were butter and cheese.



**Table 8. Volume of Exports by Country of Destination
Philippines, 2008-2010
(in LME)**

Country Destination	2009		2010		2011	
	Volume (MT)	Percent Share	Volume (MT)	Percent Share	Volume (MT)	Percent Share
Total	199.79	100.00	254.98	100.00	295.82	100.00
Malaysia	58.05	29.05	73.13	28.68	89.00	30.09
Thailand	42.33	21.18	63.67	24.97	57.27	19.36
Indonesia	47.04	23.54	38.00	14.90	45.95	15.53
Bangladesh	6.77	3.39	30.17	11.83	38.30	12.95
Vietnam					9.95	3.36
Others	45.61	22.83	50.01	19.61	55.35	18.71

Source: National Dairy Authority (NDA)
National Statistics Office (NSO)



❖ In 2011, the main countries of destination for dairy products from the Philippines were Malaysia, Thailand and Indonesia. These countries accounted for almost three fourths or 75.39 percent of the total volume of the Philippine exports.

PRICES

**Table 9. Average Farmgate Price of Milk by Animal Type,
Philippines, 2009-2011
(Peso per liter)**

Animal Type	2009	2010	2011	Percent Change 10/09
Cattle ^{1/}	32.00	30.38	30.33	(0.16)
Carabao ^{2/}	46.00	45.00	46.00	2.22
Goat ^{3/}	36.00	35.00	35.00	-

^{1/} National Dairy Authority (NDA)

^{2/} Philippine Carabao Center (PCC)

^{3/} Based on BAS Dairy Semi-annual Survey

❖ In 2011, the annual average farmgate prices of raw milk from three (3) dairy animal sources were Php 30.33 per liter for cattle, Php 46.00 per liter for carabao and Php 35.00 per liter for goat, respectively.

Department of Agriculture
BUREAU OF AGRICULTURAL STATISTICS
1184 Ben-lor Bldg., Quezon Avenue, Quezon City
LIVESTOCK & POULTRY STATISTICS DIVISION
332-15-43

info@bas.gov.ph

<http://www.bas.gov.ph>